

Living the Life You Want: *Exploring Your Needs and Preferences*

Goal

- To increase consumers' self-awareness of their personal assistance needs and preferences in order to help them effectively screen, hire, and supervise their personal assistants (PAs).

Time

4 hours, plus breaks

Activities	Teaching Methods	Time
1.1 Welcome	Large-Group Exercises, Discussion	45 minutes
1.2 Opinion Poll 1	Large-Group Exercise	30 minutes
1.3 My Ideal (or Perfect) Day	Presentation, Individual Exercise, Discussion	45 minutes
1.4 Tools to Identify Your Personal Preferences and Plan Your Assistance Needs	Large-Group Exercise, Individual Exercise	75 minutes
1.5 Opinion Poll 2	Large-Group Exercise	30 minutes
1.6 Closing	Large-Group Exercise	15 minutes

Supplies

- Flip chart, easel, markers, tape
- Nametags and/or card stock table tents
- Paper and pens or pencils
- Copies of differently colored placards with "Strongly Agree" (green), "Strongly Disagree" (red), and "Mixed Opinion" (another color) printed on them for each participant.
- Binders or folders for each participant (if you have made the decision to give these along with handouts)
- If using a projection system, be sure to have the necessary equipment ready.

Note: An LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment. Some PowerPoint slides are provided on your CD for Workshops 1 and 2. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.

Handouts

- Handout 1: Living the Life You Want: Goal and Objectives
- Handout 2: Workshop Learning Agreements
- Handout 3: Terms Used by Various Programs in Michigan
- Handout 4: Understanding Person-Centered Language
- Handout 5: Opinion Poll 1
- Handout 6: My Personal Papers
- Handout 7: My Ideal (or Perfect) Day
- Handout 8: My Assistance Planning List
- Handout 9: Fictional Consumer Stories
- Handout 10: My Preferences List
- Handout 11: Opinion Poll 2

Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants' physical needs.

Review the "Trainer's Guide" and handouts for each activity.

Set up projector and other equipment, as necessary, for optimum viewing by all participants.

Prepare a flip chart with the goal and objectives for this workshop (see **Handout 1**).

Activity 1.1 Welcome

Prepare **flip charts** for each of the steps as follows:

- Goal and objectives (step 2)
- Learning agreements (step 3)
- Day's agenda (step 4)
- Parking lot (step 5)
- Questions for introductions (step 8)

If you wish to use a different **introductory activity** than the questions in step 7, review the "*Introductory, Warm Up & Energizer Activities*" guide found on the curriculum CD, and prepare an ice-breaker to begin the day.

Copy the following **handouts** for all participants:

Handout 1: Workshop Goals and Objectives

Handout 2: Workshop Learning Agreements

Handout 3: Terms Used by Various Programs in Michigan

Handout 4: Understanding Person-Centered Language

Put **table tents and markers** at each participant's seat. As people arrive, ask them to write their names on the tents.

Activity 1.2 Opinion Poll 1

Prepare **flip chart** page with Opinion Poll 1, as shown in step 2.

Prepare the colored **placards** that say "Strongly Agree" (green), "Strongly Disagree" (red), and "Mixed Opinion" (other color).

Copy **Handout 5: Opinion Poll 1** for all participants.

Activity 1.3 My Ideal (or Perfect) Day

Copy **Handout 6: My Personal Papers** for all participants.

Prepare a **flip chart** page of "My Ideal (or Perfect) Day," as shown in step 2.

Copy **Handout 7: My Ideal (or Perfect) Day** for all participants.

Activity 1.4 Tools to Identify Your Personal Preferences and Plan Your Assistance Needs

Prior to Activity 1.4, carefully review assistance needs identified on **Handout 8: My Assistance Planning List** to be sure that the services you've identified will be paid for by the particular program funding supports for participants in your workshop. Consumer-directed programs vary, and regulations differ on what a PA can be hired to do. A PA is meant to help an individual function in the community. However, agencies that provide or oversee PA services vary in how they interpret "to help an individual function."

Make copies of **Handout 8: My Assistance Planning List** and **Handout 10: My Preferences List** for each participant. You may want to make a few extra copies of both in case participants use the lists during the fictional consumer's activity.

Make one copy for each participant of the story you choose among the alternatives in **Handout 9: Fictional Consumer Stories**.

If using overhead or LCD projection, prepare transparencies or computer files of **Handout 8: My Assistance Planning List** and **Handout 10: My Preferences List**.

Prepare a **flip chart** of the “Personal Planning List” for the fictional consumer you chose from Handout 9 (see the example for “Sherry” in step 3). NOTE: You will want to save this flip chart for reference in Workshop III, or you can transcribe its contents and create a handout to use in that workshop.

Prepare a **flip chart** of your fictional consumer’s “Preferences List” (see the example for “Sherry” in step 10). NOTE: Along with the flip chart from the fictional consumer’s “Personal Planning List,” you will want to save this flip chart for reference in Workshop III. You may also want to transcribe the contents of both flip charts and create a handout to use in that workshop.

Activity 1.5 Opinion Poll 2

Prepare a **flip chart** page of Opinion Poll 2, as shown in step 2.

Copy **Handout 11: Opinion Poll 2** for all participants.

Activity 1.6 Closing

Prepare a **flip chart** page to record evaluation scores as shown in step 3.

Activity 1.1 Welcome

45 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe the workshop goal and objectives, learning agreements, and the day's agenda;

Identify other participants by name; and

Explain the language used in the workshops and person-centered approaches.

Key Content

- This activity is designed to establish a warm, welcoming, and comfortable environment. Instructors must express the enthusiasm, good humor, and appreciation for everyone's participation described.
- It is also important during this first activity to identify any specific learning needs participants have regarding delivery of the workshop content. This may include participants wanting materials on-line, needing help filling in handouts, needing you to write larger on the flip charts or speak more loudly, or wanting people to ask them to repeat themselves when they aren't understood.
- This workshop focuses on exploring support needs and preferences. This is essential to finding personal assistants who will meet each consumer's unique support needs.

Activity Steps

Large-Group Exercise—15 minutes

1. **Welcome participants:** Introduce the instructors. Check that everyone is comfortable with the layout and temperature of the room and that everyone has filled out a table tent.
2. **Review “Workshop Goal and Objectives,”** by distributing the participants’ binders along with **Handout 1**, and posting the prepared-in-advance flip chart pages. Review the handout and encourage questions.

If appropriate, explain that this is the first in a series of workshops and later workshops will focus on building skills to recruit, hire, and supervise PAs.

LIVING THE LIFE YOU WANT

Goal

To increase participants’ awareness
of their personal assistance
needs and preferences
in order to help them effectively
screen, hire, and supervise
their personal assistants.



LIVING THE LIFE YOU WANT

Objectives

After completing this workshop, participants will be able to:

- ◆ Describe the support they need from personal assistants to live more independent and full lives.
- ◆ Distinguish their support needs from their preferences.
- ◆ Increase their comfort and ability to express their needs and preferences.



Ask participants if the goal and objectives meet their needs. Note that some participants may have participated in person-centered planning activities that have already helped them think through many of these issues and their knowledge and experience will bring added value to the workshop activities. Address any issues that arise (you may want to put some items in a “parking lot.”) Finally, ask if anyone has any burning questions about the workshop before you move on.

❖ Teaching Tip

“Parking lots” can help you keep discussions on track throughout the workshop. Post a flip chart labeled “parking lot” and explain that, if issues come up that are important to remember but not related to the topic being covered, you will ask if the issue can be noted on the flip chart so that it can be considered and addressed in the concluding discussion.

3. **Review workshop learning agreements** by passing out **Handout 2: Workshop Learning Agreements** and presenting the prepared-in-advance flip chart. Emphasize that you want to hold the workshop in a way that illustrates the same values of respect and community that drive the movement for consumer direction.

WORKSHOP LEARNING AGREEMENTS

Create a safe, supportive space:

1. Listen for understanding.
2. Speak about issues, not individuals.
3. Questions are great! None are stupid.
4. Everyone participate, no one dominate.
5. No side conversations or cell phones, please.
6. Everyone facilitate so we stay on track!



You may quote Michael Smull, a consultant in person-centered planning, as saying that our goal is to be “*unconditionally constructive*” in all discussions. Invite participants to add any other points that will help them have the best learning experience possible. Add to the flip chart and discuss. Wrap up by asking everyone if they are willing to abide by these agreements. Discuss if there is any concern and finish up when everyone agrees to make their best effort to follow the agreements.

4. **Review and confirm agenda:** In the front of the room, post the prepared-in-advance flip chart of “Today’s Agenda” and times as *you* have scheduled the session. Review and agree on the timing of the break. Address concerns about logistics or space.

TODAY'S AGENDA (SAMPLE)

1.1 Welcome	11:00 a.m.
1.2 Opinion Poll 1	11:45
1.3 My Ideal (or Perfect) Day	12:15 p.m.
Break	1:00
1.4 Tools to Plan Your Personal Preferences and Assistance Needs	1:15
1.5 Opinion Poll 2	2:30
1.6 Closing	3:00
Adjourn	3:15



5. **Explain parking lot:** Display a flip chart labeled “Parking Lot” and explain that this will be the place to record issues that come up that are important, but can’t be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session.



Discussion—15 minutes

6. **Introduce the terms we use in the workshop and those used by others in various programs:** Distribute **Handout 3: Terms Used by Various Programs in Michigan**. Note that, in this workshop, you will be referring to people who use long-term supports and services as “consumers” but that some people object to the term. The MI Choice program has begun using the terms “individuals” and “participants,” which you will also use during the sessions.

Also, there are many titles for the workers who support people with long-term assistance needs, including “providers in the Home Help program” and “aides.” In this workshop, explain that we will be using “personal assistants” or “PAs,” *not* because that is the right title, but because we had to settle on one.

Note that in Michigan, the term “self-direction” is not universally accepted. The workshop series was written using the term “consumer-directed”; “consumer-controlled” is another term still used, but the community in Michigan is moving to “participant-controlled.” The formal term that the state is using is “self-determination in long-term care.”

Explain that, although the sources of funding and the agency with whom they work to obtain services may be different, as is outlined on the handout, many of the broader principles and issues remain the same for consumers.

Ask if anyone has concerns about the terms, and thank everyone for being understanding and tolerant of the complexities.

7. **Discuss person-centered language:** Ask participants, “How many of you are familiar with the idea of person-centered language?” Invite participants to give an explanation of what it is, along with examples, and why it’s important. Discuss with the class and encourage additional contributions to the discussion. When the group is finished with its discussion, distribute **Handout 4: Understanding Person-Centered Language**. Outline for participants the values and goals that are represented by the use of person-centered language that were not covered in the discussion, referencing the goals on the handout. Then, offer any additional examples that were not already mentioned.

❖ **Teaching Tip**

If participants are not familiar with person-centered language, pass out the handout immediately and use it as the basis for discussion.

Participant Introductions—15 minutes

8. **Ask for a volunteer to start introductions:** Display and review the points on your prepared-in-advance flip chart that outline what you’d like them to share. Explain that you want to accommodate any individual needs participants have and give an example for question 5 (“For instance, you may want to ask for a partner to help with writing on the handouts, or for me to write larger on the flip chart to make it easier for you to see.”). Depending on the size of your group, note how many minutes (one to three) are allotted for each person’s introduction. Ask if everyone understands or if they need more clarification.

INTRODUCTIONS

1. What is your name (and your PA's if they are with you)?
2. Where are you from?
3. How long have you used PA services?
4. How long have you been interested in directing, or have you directed, your own services?



5. What can we do to help you have the best learning experience possible?
6. Share something you'd like us to know about you, and/or tell us a story about a positive experience you've had with a personal assistant.

❖ **Teaching Tips**

If you are training agency staff as well as consumers, adapt these questions for them:

- How long have you worked supporting consumers?
- How long have you been involved in the agency's efforts to move towards self-determination for consumers?
- Share something you'd like us to know about you, and/or tell us a story about a positive experience you've had with a consumer.
- How can we help you have the best learning experience?

It may help to give your own answers to the questions to demonstrate what you are looking for. After giving instructions, always check to see if people understand them before moving into the activity. Encourage clarifying questions.

Sample accommodations people may need include:

- Having you speak more loudly or with a microphone
- Larger writing on flip charts
- Reading all words written on flip charts or on handouts
- Assistance with reading and/or writing on worksheets.

If people suggest ways you and others can help them learn more effectively, add specific needs (with the individual's permission) to the "Learning Agreements" flip chart and facilitate arrangements for participants to support one another as needed.

Depending on your group size, you may need to intervene if participants are taking more than their allotted time. Thank the last person for their contribution, explain about the time issue and ask the next speakers to talk no more than 1 or 2 minutes.

9. **Continue with introductions of everyone in the session:** Move to the participant to the right or left of the first volunteer (based on which person seems most ready to participate) and then continue around the circle until everyone has been introduced.
10. **Wrap up by explaining the participatory nature of workshop:** Note that the style of this workshop is very participatory and interactive because each person has a lot to offer and the goal is to learn together. Everyone will have opportunities to share their thoughts, feelings, and experiences, but participants will not be forced to speak. Strongly encourage participants to ask questions if at anytime they don't understand points being made or are unclear about instructions that you've given.
11. **Thank everyone** for contributing and say, "We'll now start with our first exercise."

Activity 1.2 Opinion Poll 1

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify and express their feelings and opinions about personal assistants' roles in their lives;

Have a heightened awareness of how unacknowledged feelings about the role of personal assistants can be a barrier in the process of hiring and supervising PAs; and

Feel comfortable having and expressing opinions that are different from others in the group, and be interested in learning from the different experiences and opinions of others.

Key Content

- This activity can trigger strong responses. Many people with disabilities have not considered what it might mean to have their personal assistants help them “live the best lives possible.” This exercise may bring up strong positive and negative feelings about the quality of their lives and how people treat them.
- Having strong and unacknowledged feelings about this issue can derail a good process for selecting among candidates because consumers may identify needs or preferences out of anger and resentment, even though they do not express or perhaps even understand these feelings. One purpose of this activity is to raise participants' awareness of their emotionally charged opinions so they can better assess their support needs.

Activity Steps

Large-Group Exercise—30 minutes

1. **Give directions for the exercise:** Give each participant three differently colored placards—the first says, “Strongly Agree” (green); the second says, “Strongly Disagree” (red); and the third says, “Mixed Opinion” (other color).

Give instructions:

This opinion poll is intended to help you look at the role of personal assistants in helping you live the best life possible and what it means to you.

I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or have a mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.

After you hear the statement, please raise the placard that matches your opinion – you can say you agree, disagree or have a mixed opinion. Then we’ll hear from people in each group about why they feel that way.

❖ Teaching Tip

If space allows participants to move to three corners of the room and they are physically able, you can have participants move to one of three parts of the room to express their opinions. Post one of the colored placards on each wall to indicate where you want participants to go.

2. **Show the opinion poll:** Distribute **Handout 5: Opinion Poll 1**, and, using a prepared-in-advance flip chart, display the opinion poll and read it aloud:

Most personal assistants try to help the people they work for live the best possible lives they can.



3. **Ask for opinions:** Remind participants about correct placard or location for each group—strongly agree, strongly disagree, and mixed opinion. Ask

participants to show the card (or go the location) that best represents how they feel about the statement.

❖ **Teaching Tip**

This and subsequent opinion polls are intended to elicit participants' feelings and experiences and to stimulate initial discussions about the topics. The polls also serve as icebreakers for group interaction. Be sure to validate each person's opinion in a way that allows others to have different feelings and beliefs.

4. **Introduce brainstorming:** This is the first of many times during the workshop series when you will be leading brainstorming with participants. Introduce them to the purpose and rules of brainstorming by reviewing **Handout 5: Opinion Poll 1, page 2 of 3 – Brainstorming**. Ensure that everyone understands the rules you are asking them to follow and invite them to say they will abide by the rules or show that they will by a show of hands.
5. **Brainstorm people's ideas:** Encourage everyone in each group to share his or her ideas about how PAs do and don't help consumers live the best lives possible. Record each response on a flip chart, while highlighting that both points of view can be true. Invite those who would like to take notes to use the Opinion Poll Handout note page (page 3).

LIVING THE BEST LIVES POSSIBLE	
How PAs Help	How PAs Don't Help
How My Feelings about PAs Affect My Hiring Process	



Support participants in expressing their feelings as they respond and be sure you capture their ideas clearly and positively.

6. **Facilitate discussion of the ideas:** Once everyone has contributed their ideas, draw people into a discussion. You may ask these questions:

Which of these ideas remind you of your experience?

Which seem to come from experiences very different from your own?

Can you imagine why others, given their experiences, would feel differently than you?

How do you feel about the role of PAs in your life? What are your reactions as we discuss PAs? Why?

How do you think your reactions might influence your assessment of your support needs? How about the type of personal assistant you might hire?

For the last question, record a few responses. Highlight that if participants feel angry about the role personal assistants have played in their lives, or if they feel defeated about finding a wonderful person, or if they think that one PA they knew was “the only one” who could be great, it will affect their thinking and approach to hiring.

7. **Thank participants** for being candid about their opinions and respectful toward others in the discussion. Ask:

What have you learned from others in this discussion?

Has it affected your opinion and feelings about this issue? If so, how?

Activity 1.3: My Ideal (or Perfect) Day

45 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

More clearly describe what they need on a day-to-day basis to have fuller and happier lives; and

Describe the support they need from personal assistants to live independent and full lives.

Key Content

- For a person to lead the life she or he wants, it is important to imagine what it would look like.
- By identifying the support they need and seeking out that support, it is possible for people with disabilities to live fuller and more independent lives.

Activity Steps

Presentation—5 minutes

1. **Explain the personal papers that will be produced during the workshop series.** If you are presenting the complete workshop series, distribute **Handout 6: My Personal Papers** and explain that the group is now about to do the first exercise, which will create a paper, “My Ideal (or Perfect) Day,” that reflects their individual needs and preferences. Review all of the items on the list, highlighting how the collection is meant to give them the tools they need to effectively find, select, hire, and supervise their personal assistants. If they have a binder or folder with a section for this set of papers, direct them to put this handout, and all of the personal papers on the list, in that section.

2. **Introduce the exercise:** Display the prepared-in-advance flip chart and introduce this exercise, “My Ideal (or Perfect) Day.” Distribute **Handout 7: My Ideal (or Perfect) Day**.

MY IDEAL (OR PERFECT) DAY
<ul style="list-style-type: none">• Describe what your ideal day (living in your current home) would look like.• What personal supports would you need to make that day possible?



❖ **Teaching Tip**

If your participants respond more to the word “perfect,” use it rather than the word “ideal.”

3. **Read the two bullets** (or ask a volunteer to read) aloud and explain to participants that you’d like them to think about how they would like to live their lives, now and in the future.

Describe what your ideal or perfect day would look like.

What personal supports would you need to make that day possible?

4. **Relate to person-centered planning:** Note that this exercise is the first of a series designed to help participants build happier and more successful lives, much as “person-centered planning” activities are meant to. Ask if anyone has participated in person-centered planning and invite them to describe their experiences for a minute. If there is a volunteer, thank them for sharing. Describe how, traditionally, assistance services have been organized to address what’s important *for* a person – assistance with ADLs and medical care – but service providers have often overlooked what’s important *to* the individual person. We are asking participants to consider what is important *to* each of them.

5. **Give directions:** Explain that you want participants to think of a day that's part of their current lives, in their present homes. What would that day be like – with supports, including ones they currently don't have – if they were to feel really happy and content. If they can describe a *possible* ideal day and not a far-out fantasy, it will help them explore how they can use supports and make choices to live the best life possible. Also, explain that they will need to communicate about themselves when they look for and hire PAs. For instance, when interviewing candidates, they will need to explain their needs and preferences. This activity is good practice.

Ask participants to take 5–10 minutes to consider their answers, and invite them to use **Handout 7: My Ideal (or Perfect) Day** to write out their responses. If participants need assistance with writing, or would find it easier to do the exercise in pairs, explain that they are welcome to do that – as long as they both take time to focus on their individual preferences and wishes.

Individual Exercise—5–10 minutes

6. **Have participants think about their own ideal days** based on instructions above.

❖ **Teaching Tips**

Circulate among participants as they work on their lists, offering support and suggestions, and encouraging them to use their imagination. Use the open-ended questions on **Handout 7** to draw them out:

- What would you do? *Where would you go? What would need to be in place for that activity to occur?*

Despite your instructions, some people may “leave their disability at the door.” Once they have fantasized a little about life without disability, ask them:

- *Okay—so how could you do that tomorrow?* Encourage imagination: *If you could have any services you need to make it happen, what would those services be?*

If participants wish to work alone, but are unable to record their responses on the handout, offer to take time during the break or lunch to help them fill out their handouts.

After 5 minutes have passed, ask if participants would like more time, and depending on how much time remains and your sense of their need to have more private time to think, allow up to 10 minutes.

Discussion—30–35 minutes

7. **Discuss responses:** Ask for a volunteer to begin. Allow 3–5 minutes for each participant to respond. Encourage participants to add to their own visions if they like ideas from others.
8. **Explore common and distinct characteristics of ideal days:** Ask participants to identify the “distinct” and “shared” or common characteristics of the days people have described.

IDEAL DAY CHARACTERISTICS	
Distinct	Shared



Emphasize how natural it is that people have different ideas about what a good day looks like and how much we want to expand their opportunities to have the kinds of days they would like.

9. **Discuss impact on supports:** Have an open discussion about how imagining their ideal days affected them and how it changes their ideas about the supports they need. Ask:

How does thinking of your ideal day make you feel?

Can you give examples of how thinking about your ideal day changes your ideas about the personal supports you want and need?

❖ **Teaching Option**

If there are more than ten participants, you may want to split them into two groups so that each person has enough time to share his or her thoughts. Each group should have a facilitator to write ideas on a flip chart.

10. **Thank everyone** for their participation and explain that the workshop will now be focusing on their personal support needs in more detail.

Activity 1.4 Tools to Identify Your Personal Preferences and Plan Your Assistance Needs

75 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Articulate their assistance needs and their preferences and be able to distinguish one from the other; and

Begin to see how identifying—and distinguishing between—their own assistance needs and preferences will:

- *Contribute to finding a PA who comes closer to their ideal, and*
- *Help them provide guidance and support to their PAs, so they can come closer to meeting their needs and preferences.*

Key Content

- One essential responsibility of an employer is screening and hiring. To be most effective in these steps, an employer needs to know not only what has to be done (tasks), but how he or she likes the tasks done (preferences). For example, in hiring a typist, an employer wants to know: Can the candidate type? How fast? How accurately? But also it may be important to know if the candidate works well under pressure, is flexible about scheduling if a project requires extra hours, has a good sense of humor, etc.
- It is unlikely that anyone will find his or her ideal PA. However, this assessment process will allow participants to:
 - Make conscious choices or trade-offs when screening and hiring PA candidates.

- Determine in which areas PAs who are hired need support and guidance.

Activity Steps

Large-Group Exercise—15 minutes

1. Explain how this activity links to the “Ideal or Perfect Day” exercise:

Note that in the previous activity, each of the participants described their ideal day. Acknowledge that this may have been a stretch because:

- They may never have been given the opportunity to dream of what they could do with the appropriate supports and may have felt limited by agency services.
- They may have interviewed or hired PAs based in large part on the PA’s availability or training. Consumers often neglect to factor in their own dreams and preferences when seeking PAs who fit their personality and lifestyle.
- If they only have experience with the agency model, they may not have had the opportunity to choose a PA.

2. Introduce this exercise: Explain that the purpose of this activity is to provide them with two assessment tools, or checklists, to help them identify their personal assistance needs along with their preferences for how those needs are met. This knowledge will ultimately be used to select a PA who is as close to their ideal as possible and can support them in having more perfect days.

❖ **Teaching Tips**

This may be the first time some participants have engaged in an assessment of this type. Thus, they may need further orientation to the activity and support for expressing their preferences in concrete ways. If other participants have participated in person-centered planning, they may be able to support those who are not familiar with the process.

Stress to participants that completing the lists is not the only intended purpose of this activity. The activity is designed to help them understand that expressing preferences is as important as expressing needs when seeking or hiring Pas.

3. **Introduce the planning list:** Distribute **Handout 8: My Assistance Planning List** to each participant and using your prepared-in-advance flip chart, explain that this 3-page list has one page for ADLs, one for medical assistance, and one for “other” needs.

SHERRY'S PERSONAL ASSISTANCE PLANNING LIST	
1.	Activities of Daily Living
2.	Medical Assistance
3.	Other Supports & Services



4. **Explain purpose of the planning list:** Explain that using the planning list can help participants determine the type—and timing—of their service needs. In the language that is used in person-centered planning, the planning list is meant to help people determine what is important *for* them so that they can live day-to-day. In addition, explain how this list also acts as a guide to estimate how many PAs are needed (including back-ups) during a typical week. The list may not cover all the needs of every participant, so encourage them to add additional service needs. (If projection equipment is available, also display **Handout 8: My Assistance Planning List** on a screen or blank wall.)

❖ **Teaching Tips**

It may be helpful to remind participants that when an agency directs a person's care, it develops a "care plan" that is followed by the home health aides, nurses, certified nurse assistants, PAs, and others delivering services. An agency also sometimes determines the type of care—and how many hours of service—the consumer receives. Participants who have engaged in person-centered planning may have had an opportunity to participate in developing similar lists to identify their needs. You may ask who has done this.

Explain that in the consumer-directed model, participants have an opportunity to determine what works best for *them*, which is why it is important to thoughtfully develop a "My Assistance Planning List." This is one of the advantages of the consumer-directed model—the consumer has more control over the type of support he or she receives and when it is delivered.

- 5. Introduce a fictional consumer:** Distribute the story you have selected among the alternatives in **Handout 9: Fictional Consumer Stories**. Explain that you are distributing and will read a short biography of a fictional consumer needing PA services, and then you will ask them to work with you to review the planning list based upon that story and make some decisions about how they would complete the fictional consumer's list. This will give participants practice with the planning list before doing their own. Also, explain that this fictional consumer will appear again in future activities.

Read aloud (or ask for a volunteer to read) one fictional consumer story you have selected.

Explain that the blank planning list you have handed out (Handout 8) will be for them to use for themselves. Suggest that they not write on it during the discussion of the fictional consumer's needs – just use it as a reference.

- 6. Review the planning list and discuss responses for the fictional consumer:** Ask participants to suggest what the consumer may need for each item on the planning list—what is important *for* them. Encourage everyone to participate. Note their responses on the flip chart. Use additional flip charts as necessary, but keep the discussion moving quickly.

<p>SHERRY'S PERSONAL ASSISTANCE PLANNING LIST</p>
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<ol style="list-style-type: none">1. Activities of Daily Living<ul style="list-style-type: none">--2. Medical Assistance<ul style="list-style-type: none">--3. Other Supports & Services<ul style="list-style-type: none">--

If projecting the planning list, add participants' responses to the projected grid.

❖ **Teaching Tips**

Don't get caught up debating differences of opinion concerning the fictional consumer's needs. Take the first response, and have participants build on each others' suggestions. Accept contradictory ideas as good possibilities about how a consumer might get his or her needs met. Make this a fun activity. Participants are essentially making up their own story about who the consumer is.

The reason to take the time to discuss a fictional consumer's "My Assistance Planning List"—and the "My Preferences" list next—is to familiarize participants with the lists before working on their own. Also, participants are likely to be stronger advocates for another consumer than for themselves. Once they've discussed what this consumer needs, it is hoped that they will have an easier time completing the planning lists for themselves.

Individual Exercise—20 minutes

7. **Have participants complete their own planning lists:** After participants have discussed the planning list for the fictional consumer, ask them to use **Handout 8: My Assistance Planning List** to fill in their own needs and identify what is important *for* them. Encourage them to add items to the list that reflect their personal situations. Give them 15 minutes to begin their list, and encourage them to continue working on it at home. If they are more

comfortable or would like to work with another person in pairs, invite them to do so, but encourage them to each complete their own lists as much as possible.

❖ **Teaching Tip**

Circulate among participants as they work on their lists, offering support and suggestions.

8. **Wrap up with participants:** Ask participants if they were surprised by what they learned by beginning to complete their planning lists. Explain that you will now be moving on to introduce them to the next planning list, which will help them explore their preferences as well as their needs. Again, encourage them to continue working on their lists at home.

Large-Group Exercise—15 minutes

9. **Introduce preferences:** Distribute **Handout 10: My Preferences List** to each participant. (If you have projection equipment available, display the “My Preferences List” handout on a screen or wall where it can be seen by all participants.) Explain that this list is designed to help participants explore their personal likes, dislikes, preferences, styles, and needs related to their lifestyle choices, habits, values, and schedules. In person-centered planning, this is the exploration of what is important *to* the consumer. You can also explain that this exercise will help them shape their PA interviews.
10. **Discuss the “My Preferences List” for the fictional consumer:** Display the prepared-in-advance flip chart and review the topics on the three pages of the list. Remind participants of the identity of the fictional consumer they recently discussed, and ask them to imagine his or her preferences for each item on the list. What do they think will be important *to* the fictional consumer? Go through the three pages of the list, and ask participants to identify the fictional consumer’s preferences. Invite participants to add other items to the lists. Quickly record responses on the flip chart.

Again, explain that the list you gave them (Handout 10) will be for them to use for themselves. Suggest that they not write on it during the discussion of the fictional consumer’s needs – just use it as a reference.

SHERRY'S PREFERENCES LIST	
1. My Ideal Personal Assistant	
-	
-	
2. My PA's Talents and Skills	
-	
-	
3. My Other Personal Preferences	
-	
-	



If projecting the “My Preferences List” handout, add participants’ responses to the projected grid.

Again, emphasize that there’s no reason to debate differences of opinion. Participants are making up this person’s preferences. This exercise is important, not because the group is coming up with the “right” answers, but because it’s good to consider and hear how everyone would imagine another consumer satisfying his or her preferences.

Individual Exercise—20 minutes

11. **Have participants complete their own “My Preferences List:”** After participants have finished discussing the fictional consumer’s preferences, tell them to now use **Handout 10: My Preferences List** to explore their own preferences and decide what is important *to them*. Encourage them to add items to the list that reflect their own preferences. Give them 15 minutes to begin their list, and encourage them to continue working on it at home. Invite them to work with a partner, if they would prefer.

❖ Teaching Tip

Circulate among participants as they work on their lists, offering support and suggestions.

12. **Wrap up with participants:** Explain that the time available for this activity is up and that you know they were not likely to have completed their lists. Encourage them to continue working on their lists at home.

Discussion—5 minutes

13. **Wrap up for the whole activity:** Ask participants:

What have you learned from starting to work on your planning and preferences lists?

What surprised you?

How does this process of identifying needs and preferences compare to what you have done in the past?

14. **Thank everyone** for their hard work and thoughtful participation.

Activity 1.5 Opinion Poll 2

30 minutes

Learning Outcome

By the end of this activity, participants will be able to:

Express their feelings and/or reactions to taking time to identify their needs and preferences before searching for PAs; and

Describe how past negative experiences in trying to hire a PA may interfere with their ability to find someone who is a good match for them.

Key Content

- This opinion poll asks participants to reflect on their feelings about and/or reactions to using a formal process to identify their needs prior to beginning the search for personal assistants. Having strong unacknowledged beliefs about the activities and checklists can derail the hiring process because participants may not believe these investigations can make a difference. One purpose of this activity is to help participants become aware of their feelings so they can see how those feelings might interfere with this process and short-circuit its potential to have a positive impact on their ability to find PAs who are good matches for them.
- Many disempowered people, including many people with disabilities, are not assertive in stating their beliefs and desires because their life experiences have shown that they don't always (or often) get what they ask for. A second goal of this activity is to encourage and support participants in asking for what they need and want.

Activity Steps

Large-Group Exercise—30 minutes

- 1. Introduce exercise and give instructions:** Ask participants to pull out their three differently colored placards that say, "Strongly Agree," "Strongly Disagree," and "Mixed Opinion." Give directions:

This second opinion poll is intended to help you acknowledge what you think about using the process and forms we just completed, or similar ones you may have encountered in person-centered planning activities, to work toward hiring a PA who is a good match for you.

I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or are of mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.

After you hear the statement, please raise the placard that matches your opinion, and then we'll hear from people in each group about why they feel that way.

❖ **Teaching Tip**

If space allows participants to move to three corners of the room and they are physically able, you can have participants move to one of three parts of the room to express their opinions. Post one of the colored placards on each wall to indicate where you want participants to go.

2. **Read the opinion poll:** Display the prepared-in-advance flip chart with the second opinion poll and read it aloud:

Completing the My Assistance Planning List and My Preferences List forms is good—but it won't get me much better service.

3. **Ask participants to show opinions:** Remind participants about the correct placard or location for each group—strongly agree, strongly disagree, mixed opinion. Ask participants to raise the placard that best describes their opinion (or go to the location) that best represents how they feel about the statement.
4. **Facilitate dialogue** by encouraging everyone in each group to explain his or her opinion. Questions you can use to lead the discussion include:

Why do you think identifying your needs and preferences will – or won't – help you select PAs?

Did you find it easy or difficult to sort out your needs and preferences in this way? Why?

Can you recall how not being fully aware of your needs and preferences may have led you to have less positive experiences in hiring PAs?

How can being conscious of your preferences help you find a PA that better meets your needs?

If you cannot find a PA who meets your ideal, how would knowing your preferences help you to make trade-offs and choose the best person to meet your needs?

❖ **Teaching Tip**

If participants express discomfort with the planning tools, suggest other options for identifying needs and preferences. For example, writing or taping a narrative about oneself; explaining your preferences to a friend; using an old care plan from agency-directed services; or talking to a case manager or counselor at a support agency about using the person-centered planning processes and tools that are available.

To help participants think about how to prioritize and make trade-offs, refer back to the fictional consumer's assistance planning list and preferences. Ask:

If the consumer couldn't find his or her ideal PA, what trade-offs might the consumer make?

5. **Thank everyone** for sharing their points of view and listening to others respectfully.

Activity 1.6 Closing

10 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify their level of comfort in directing their own PA services; and

State the next steps for additional training or follow up.

Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group.
- The end-of-day wrap-up also allows participants to share what they learned and reflect on how the workshop has affected their lives. Finally, it gives participants the chance to do an informal evaluation for the instructor about which parts of the workshop were most useful and which could be improved.

Activity Steps

Discussion—30 minutes

1. **Introduce the closing and check on day's learning:** Explain that this is the end of Workshop 1, "Living the Life You Want as a Consumer." Say that you would like to reflect on what participants learned and how they can use what they've learned. Ask:

What is the most important thing you learned in this workshop?

How do you think you can apply what you learned to your own situation?

If there are items in your "parking lot," recall them, address those that you can quickly respond to, and discuss how to follow up on the others.

2. **Encourage participants to continue using their handouts to explore their needs and preferences:** Remind participants that they only had time to begin working on their lists and encourage them to continue thinking about them and filling them out. If they are enrolled in the next workshop, “Understanding the Consumer-Directed Option: Is It Right for You?” the lists will be referenced and it will be helpful to bring them. If this is a stand-alone class or participants don’t plan to continue with the workshop series, suggest that continuing to work on the lists will help them to more fully understand their personal assistance needs and preferences and select the right providers. Encourage them to add items to the lists that reflect their personal situations, new insights, and their visions for an ideal day.
3. **Conduct a quick evaluation** by asking participants: *How much of today was a good use of your time?* Invite participants to vote for the percentages you have listed on a prepared flip chart as shown below.

After they’ve voted and you’ve recorded their responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked *really well* for them—the highlights—and what they think could be better—the things to improve. Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

WORKSHOP EVALUATION	
____ 25% ■ ____ 50% ■ ____ 75% ■ ____ 90%	
<u>Highlights</u>	<u>Things to Improve</u>



4. **Thank participants who gave specific feedback, both positive and critical**, and emphasize that it will help you improve future sessions.
5. **Thank everyone for his or her feedback and participation and speak about future plans:** Explain your future plans. If you are offering the whole series, explain that the next workshops in the series will focus on self-determination, recruiting and hiring PAs, and supervision skills.

Remind those who plan to take the next workshop to bring their binders or folders with all their papers, including planning lists, to the next session. Ask everyone to leave their opinion placards with you.

If participants have not signed up for the entire series, explain that everyone is invited to participate. (Give dates if workshops are on the calendar and, if necessary, explain the enrollment procedure.)

6. **Adjourn:** A fun way to draw the session to a close is to call for a motion to adjourn and invite all who agree to say, "Aye!!"
7. **Celebrate**, as appropriate.

Note: For participants who don't continue in the workshop series, you may want to set up a different mechanism to review the planning lists. This could be done during a meeting with a case manager or in a support group set up for clients considering the consumer-directed option.